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OFFICE OF RESEARCH AND REPORTS

BRIEFING PAPER
1958

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Introduction

The past year has seen an intensification of the struggle between the Free World and the Communist Bloc. Activities and policies of the Sino-Soviet Bloc countries have become increasingly aggressive and appear to reflect a growing conviction among Communist leaders that, to paraphrase Khrushchev, an irrevocable shift in the relation of forces in the world is taking place to the advantage of the Communist Bloc.

In addition to the security threat posed by the Soviet lead in missiles and in the race for outer space, the USSR in concert with other Bloc countries has challenged the West in the economic field. This effort is being mounted on two fronts: at home, through intensive efforts to achieve and sustain rapid economic growth; and abroad, through an aggressive and sustained campaign of trade and foreign aid, particularly in the less developed areas of the world. In the Soviet Union, the new Seven Year Plan was released with great fanfare by Khrushchev in the late fall. That Plan, discussed in the 21st Party Congress in Moscow, is ambitious. It calls for industrial growth at a rate twice that anticipated in the United States during the same period. Khrushchev, in words intended to be heard in the less developed countries as well as in the USSR, boasted that by 1970, five years beyond the end of the Seven Year Plan "... and possibly even earlier, the Soviet Union will gain first place in the world both as regards absolute output and the output of goods per capita,

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which will ensure for the [Soviet] population the highest living standards in the world. That will be the world historic victory of socialism in its peaceful competition with capitalism."

Mr. Khrushchev was, we feel, over-optimistic. But the Seven Year Plan does schedule an impressive economic achievement and by 1965 the output of many raw materials and industrial products will approach and in some cases exceed that of the U.S. These production achievements, which in the main we regard as feasible, will mean a 79% expansion of Soviet industrial output by 1965. Furthermore, and probably of equal importance, we look for the Soviets to use their production achievements in the next seven years as the basis of a powerful propaganda campaign aimed at the uncommitted, less developed countries of the world.

Elsewhere in the Bloc, dramatic developments have been taking place in Communist China. The year 1958 saw the development of the "great leap forward" in production and the organization of Chinese manpower in the new "Communes". These developments are being closely watched. Total production in China is as yet unimpressive by Western standards but the rate of economic growth is admittedly most impressive. Here again, Communist propaganda is loudly exploiting production successes as evidence of the superiority of the Communist system, a message that can carry a strong appeal to small countries ambitious for economic progress.

The intensification of the East-West conflict has had a major impact on our economic intelligence activities and the urgency of our

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mission has mounted. The priority assigned both to the collection and production of economic intelligence has been advanced.

In today's world, the long-run balance of national power depends on economic capabilities and relative economic growth. The gravity of the threat with which the Communist Bloc has confronted us cannot be dismissed. It follows that reliable and objective intelligence on the Communist economies - their strengths and weaknesses, their problems, interests and prospects - must be available to those responsible for shaping the U.S. reaction to the threat. Our Office of Research and Reports provides such economic intelligence support. In describing the work of this Office, I shall mention, in addition to its economic and geographic intelligence effort, some other activities which include its coordinating responsibility and its intelligence support to economic defense.

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Economic Intelligence

The challenge presented by the continuing growth of the Bloc economies has given great emphasis to the need for economic intelligence. By inter-agency agreement and DCI directive the primary responsibility for economic research on the Sino-Soviet Bloc now rests squarely in the Office of Research and Reports.

An adequate assessment of the complex and closely interrelated problems of the economies of the Sino-Soviet Bloc requires an integrated approach to the research effort. Other components of the intelligence community are not equipped to conduct Bloc economic research on an over-all basis, nor are they charged with this responsibility; their economic research efforts are oriented toward their individual departmental interests. ORR, to meet its responsibility, must direct its intelligence effort at all levels of the economies of the Sino-Soviet Bloc in varying degrees of intensity. Our analyses have emphasized the exploration of the economic factors which will play a major role in the determination of the future course of the Bloc economies. In this connection, considerable attention has been given to the economic interdependence existing between the Bloc economies and to the substantial reorientation of international trade among Bloc members and between them and the Free World.

In 1958 this Office devoted an important part of its research effort to the analysis of economic growth in the USSR. Even before the Soviet announcements on the Seven Year Plan, ORR had provided

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policy makers with evidence of some slowing down in the rate of Soviet industrial growth. A major research effort has been underway during 1958 to determine the role of the raw material and energy base in Soviet economic growth. Through this research we hope to specify and evaluate (a) the factors affecting the expansion of the Soviet raw material and energy base and (b) the relationship of this expansion to Soviet economic growth. Our analysis of economic administration in the USSR, which earlier revealed the existence of serious difficulties, has continued. Emphasis is placed on the industrial and agricultural reorganization in an attempt to evaluate the impact of these changes upon the future course of the Soviet economy.

The Office continued in 1958 to intensify its economic research on Communist China. We are engaged in a program of complementary and interlocking research projects dealing with the Chinese economy. This program includes the study and evaluation of the Chinese potential for industrial growth, and an evaluation of all available information on the continued dependence of the Chinese Communists on the technical assistance, plant equipment, and other capital goods being furnished by the Soviet Union and the European Satellites. The sweeping institutional changes introduced in the past year and the feasibility of the ambitious Chinese economic goals are under serious scrutiny

Despite the efforts of the leadership, unrest continues to exist in several of the European Satellites. ORR research, therefore, continues to address itself to the exploration of those economic factors

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which could lead to increased disturbances in the European Satellites in the coming years. A growing interest, however, is being taken in the longer-run future of the Satellite economies, with particular focus on the relationship of these economies with that of the Soviet Union in the years after 1960.

The Office in 1958 substantially increased the number of analysts devoted to research on the economic aspects of the Soviet guided missile programs. Concurrently, the broad research capabilities of ORR in related fields, such as transportation, construction, chemicals, electronics and military costing, were also brought to bear on this question. As a result of these efforts and unique capabilities, ORR has been the principal contributor on questions relating to Soviet production and deployment of missiles and other related economic factors to National Intelligence Estimates and Department of State "disarmament" planning papers. In addition, ORR is actively supporting the guided missiles intelligence collection effort in two ways: (1) by assigning an experienced intelligence officer to assist in planning collection operations and (2) by assigning overseas highly qualified guided missiles intelligence officers to assist in clandestine collection activities, particularly at interrogation centers.

The research effort on the economic aspects of Soviet Bloc atomic energy activities has also been substantially increased during 1958. ORR made a very significant contribution, through the JAEIC Economic Working Group to the National Intelligence Estimate on the Soviet atomic energy

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program. ORR research on the economic aspects of the Soviet atomic energy program in support of JAEIC is being supplemented by an external research project, "Economic Criteria for Adopting Nuclear Power Plants", now being done [REDACTED] 25X1A5a1

During the past year, Sino-Soviet Bloc countries intensified their efforts to penetrate less developed areas of the Free World through expanded trade and economic aid programs. ORR continues to monitor and analyze developments in this field, and provides, in cooperation with the Department of State, most of the intelligence on the Sino-Soviet Bloc economic offensive which is distributed as agreed intelligence in publications of the Economic Intelligence Committee.

While Soviet announcements and recent statistical publications in certain non-strategic fields have been of value in our analysis of the Soviet Bloc economies, the Office must continue its intensive analysis of fragmentary and often conflicting data obtained overtly and covertly from innumerable sources in order to develop the economic intelligence on the Sino-Soviet Bloc that is required both in production of National Intelligence Estimates and in a variety of special studies in response to other high priority requests. The complexity of the job and the need for an integrated approach demand that the economist, the technical expert, the country specialist, with their individual skills, all become vital elements of the research team. Experience has shown that additional training oriented toward special intelligence research tasks, although expensive and time consuming, is necessary for virtually all these specialists in order to integrate them into effective working groups.

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Attention is being given to the development of new techniques of analysis in order to make maximum use of the factual information which is constantly flowing into the Office. At a time when rising military expenditures have become a principal, if not the primary, economic concern of the world powers, the analytical approach developed in the past few years by ORR for estimating the cost of Soviet military programs has provided the intelligence community with an additional dimension for evaluating and refining the magnitude and composition of estimated Soviet military programs developed by other intelligence techniques. ORR has extended this cost analysis to the intelligence community's estimates of present and future Soviet atomic energy developments, in an effort to obtain a measure of the capability of the Soviet economy to provide the facilities and new investments indicated.

The rigorous inspection of Soviet cost and price relationships now being undertaken by ORR is expected to represent an important step in the determination of the principal areas of Soviet industrial strength and weakness. It is hoped that the results of these studies will facilitate for us the forecasting of production trends in the Soviet domestic economy and the character and magnitude of future Soviet Bloc economic activities in non-Bloc areas, particularly as they may be in competition with those of the United States and other Free World countries.

Concurrently with its comprehensive economic research, the Office of Research and Reports evaluates and interprets current

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economic developments within the Bloc countries viewed in their relation to the Free World. A special staff, working in close cooperation with the Office of Current Intelligence and supported by appropriate research components, prepares timely reports of these developments for inclusion in the Agency's and intelligence community's output of current intelligence. The same mechanism is used in marshalling the full support of this Office behind the National Indications Center and the IAC Watch Committee.

Other studies yielding highly factual information of broad interest to the community are based on [REDACTED] 25X1B4d

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Each of our economic research components periodically calls upon a small number of cleared consultants drawn from among top executives in American industry and from leading economists outside the Government. Through these consultants meeting with us individually or as panels, we obtain an excellent independent check on the soundness of our estimates and advice on ways to simplify or

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economize in our research procedures. Reciprocally, senior personnel of this Office are increasing the number and scope of their briefings before business and economic groups -- thereby serving a valuable educational/public relations function between CIA and the public.

The annual economic research program of the Office, aimed as it is at serving many different interests and purposes, is necessarily complex and of broad scope. Past experience, now analyzed quantitatively through the use of IBM methods, is depended on heavily in the development of new programs and in the quarterly program reviews. Particular attention is given to the Priority National Intelligence Objectives and to such advice as our principal consumers are able to provide concerning their requirements in the months to come. Formulation of the program begins with full provision for support to the production of scheduled and anticipated National Intelligence Estimates. Provision must also be made for scheduled contributions to the National Intelligence Surveys, where the Office has responsibility for the economic sections of the NIS dealing with the Sino-Soviet Bloc. Similarly, certain aspects of our work in support of other agencies are scheduled in response to community-wide deficiencies in economic intelligence as identified by the Economic Intelligence Committee. In addition, we are aware from experience that a substantial portion of our research time will have to be spent in meeting "crash" or emergency requests from various high-level consumers. Finally, we attempt in our research planning to find time for projects which will examine economic questions likely to become of national intelligence significance in the future.

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It is in this manner that the Office of Research and Reports provides the necessary intelligence on economic activities and trends of the countries within the Sino-Soviet Bloc.

Geographic Intelligence

We maintain within our Office of Research and Reports a group of competent geographic analysts who provide research and technical support to all parts of the intelligence community and contribute substantially to the National Intelligence Survey Program.

A major part of the work of the geographic group, mostly in the form of geographic intelligence reports and maps, is undertaken in direct support of operations planning and field activities, either of the Agency or the Armed Services. On the accuracy of this effort may depend the lives of individuals who are either to be rescued from hostile territory or put into hostile territory to accomplish operational missions. Air Force crew members have been briefed, preparatory to special missions, using the geographic reports prepared by this Office on how to evade or escape should USAF planes crash land behind enemy lines. Similar reports are prepared in support of unconventional warfare and psychological warfare programs, incorporating intelligence on a wide variety of environmental factors including analyses of minority groups, border zones, strategic regions, routes of clandestine movement, target installations, and closely allied topics.

Geographic intelligence research has also been directed toward aiding the surveillance of USSR and Chinese Communist progress in guided

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missiles by providing analyses of feasible sites for missile testing and training ranges. Other studies have contributed to intelligence estimates of Sino-Soviet Bloc economic development through the analysis of the influence of physical geographic factors on Communist capabilities to meet goals in the fields of agricultural production, hydroelectric power generation, and construction of major transportation routes.

During the past year, a number of geographic intelligence reports and briefings were prepared on USSR operations in Antarctica and the Soviet Arctic with a particular view of assessing the significance of Soviet achievements and long-range intentions as they may affect United States interests in the Polar regions. In this work, we are closely supporting the Operations Coordinating Board through its Working Group on Antarctica. In association with the Office of Scientific Intelligence and the Armed Services, we are also analyzing Soviet geodetic activities as conducted within the USSR and abroad. By these analyses, the community is better able to evaluate Soviet progress in geodetic positioning for long-range targeting purposes.

Experience has shown that one of the most effective ways of presenting intelligence is to make extensive use of specially constructed maps. Our cartographic unit within the Office plans and prepares these intelligence maps for inclusion in CIA reports, National Intelligence Estimates, National Intelligence Surveys, and for many other purposes including covert planning and operations.

An extensive map library and map reference facility is also maintained for use by all authorized Government officials. Its

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specialized collection of foreign maps is kept current through a coordinated and highly effective interagency map procurement program that reflects the requirements of the several Government agencies having need for foreign maps and minimizes the possibility of duplicative collection efforts.

Interagency Coordination

In carrying out CIA's responsibilities for coordinating economic intelligence relating to national security, the Office of Research and Reports plays an active role in the work of the interagency Economic Intelligence Committee (EIC), established in 1951 under CIA Chairmanship. The membership of this Committee is made up of representatives of the following USIB agencies: the Department of State; the Departments of the Army, Navy, and Air Force; the Joint Staff (JCS); the National Security Agency; the Office of Special Operations (OSD); and CIA. A number of non-USIB agencies are associate members, including the Departments of Agriculture, Commerce, and Interior, and the International Cooperation Administration. The Office of Research and Reports provides secretariat services for the main committee and for 14 subcommittees, as well as for working groups.

Among the principal responsibilities of the EIC is to produce or arrange for the production of agreed interdepartmental reports on selected economic intelligence matters of national security interest. For example, biweekly and semi-annual summary reports on Sino-Soviet

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Bloc economic penetration efforts in the less developed areas of the Free World are produced and distributed throughout the U.S. Government to key officials and offices, including principal overseas missions, stations, and commands. Coordination of reports on such subjects as Communist China's foreign trade; Soviet agricultural policies, performance, and prospects; trends in Middle East oil; and Soviet civil defense and air raid shelter construction, has also been effected through the EIC. In addition, a number of the substantive subcommittees have undertaken the review and discussion of economic intelligence research programs of individual participating agencies as a means towards reducing unnecessary overlap and duplication.

The EIC reviews systematically the economic intelligence effort within the U.S. Government to assist in identifying priority deficiencies in research and collection and in avoiding unnecessary duplication by the individual agencies. The survey listings of the EIC which periodically report the status of internal and external (contractual) U.S. Government economic intelligence studies and related research on the Sino-Soviet Bloc and on Free World underdeveloped areas involved in Bloc economic penetration efforts represent another means by which duplication in research programing is reduced. In 1958, a special survey of U.S. Government professional personnel engaged in economic intelligence and related economic research was undertaken by the EIC. Further, as a guide for economic intelligence collection and production, statements of "Priority National Economic Intelligence Objectives" are issued as a means of identifying and expanding the economic aspects of the USIB-issued

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"Priority National Intelligence Objectives". Proposals for external economic research contracts amounting to \$5,000 or more are reviewed by the EIC, which forwards comments and suggestions to the sponsoring agencies for their guidance. Through the EIC mechanism, the Office of Research and Reports, as the organization primarily responsible for providing intelligence on the economies of the countries of the Sino-Soviet Bloc, obtains guidance in the continuing re-examination of its own research program. The several EIC subcommittees provide technical advice and suggestions to the USIB Ad Hoc Committee on Exchanges in connection with proposed exchange visits of Soviet and U.S. professional and technical personnel.

The EIC has also directed its attention to the problem of planning for wartime emergency operation and is coordinating this planning with other USIB committees and with EIC member agencies.

Continued efforts are directed by the EIC toward improved coordination of collection requirements. Through such activities as [REDACTED] 25X1B0b1

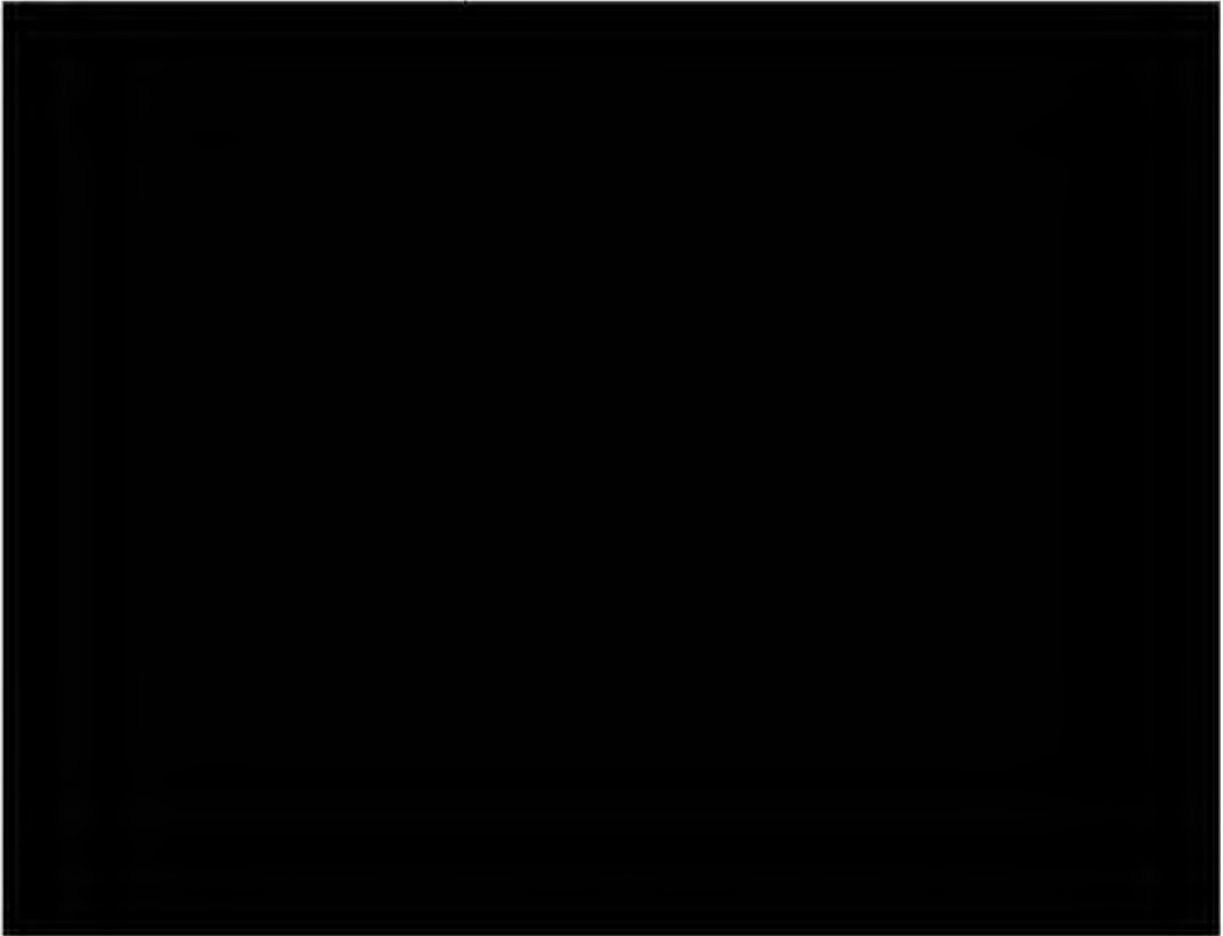
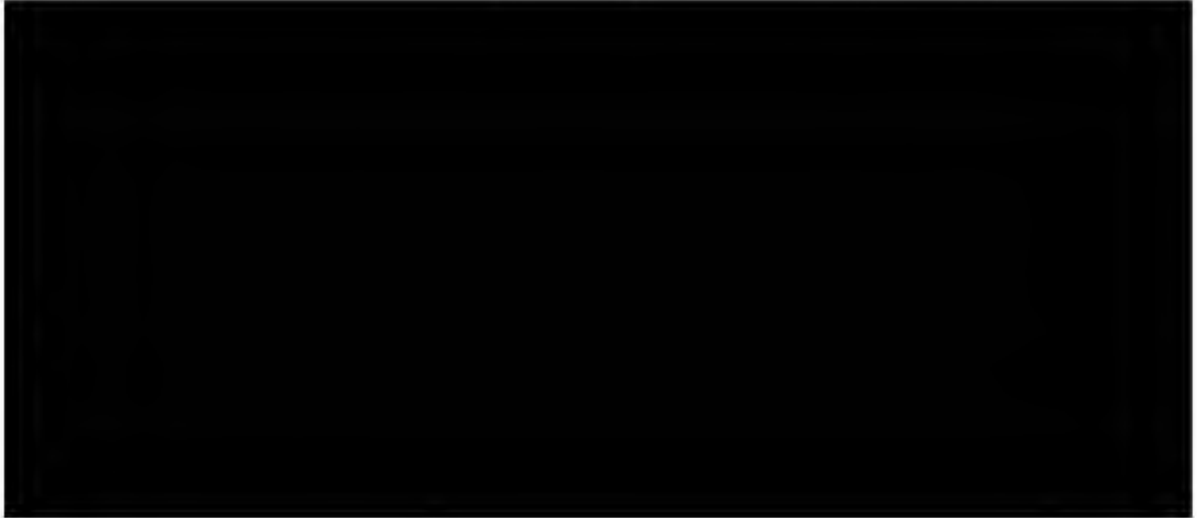
[REDACTED] Economic Reporting Guidance Programs systematic guidance is provided to officials traveling within and reporting on Bloc countries.

CIA plays an active role in support of the U.S. economic defense program. The Office represents the Agency on the Economic Defense Advisory Committee (EDAC) and the Advisory Committee on Export Policy (ACEP). Our activities include not only production of intelligence in support of economic defense policy but also, under NSC directive, the provision to action agencies of intelligence on illegal transactions and other efforts to circumvent controls.

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25X1B4d This Office performs another coordinating function and service of
common concern to the intelligence community by the maintenance of the



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1958 PLAUDITS

1. From Acting Director, IRA/State to AD/RR, 17 November 1958, expressing appreciation for a study on the "Capacity of the Sino-Soviet Bloc to Export Petroleum to the Free World." He termed the report an excellent analysis of the problem and commented on its usefulness to the Department. (UNCLASSIFIED)
2. On several occasions, personnel of the Cartography Division, Geographic Research Area were complimented by the Department of State for assistance given them to fulfill several high priority assignments. The U.S. Representative to the United Nations, Henry Cabot Lodge, and the Special Assistant to the President, Gordon Gray, also expressed appreciation for support rendered them on a crash basis to meet specific requirements. (UNCLASSIFIED)
3. From Executive Officer, OCB to DCI, 20 June 1958, regarding the intelligence support rendered by CIA to the OCB. He stated that the intelligence on Soviet penetration activities has been instrumental in the production of improved OCB Reports by the various working groups and enables the Board to make more effective decisions in the fulfillment of their mission. (UNCLASSIFIED)
4. From Director, WSEC, Office of Assistant Secretary of Defense to DCI, 23 May 1958, in appreciation for preparing a study on Soviet Military Transportation Capability to be incorporated in a WSEC study on Soviet Military Capabilities. (SECRET)
5. From Gabriel Hauge, The White House Staff, to DCI, 22 April 1958, expressing appreciation for assistance received from ORR in the preparation of a lecture on "Some Aspects of the Russian Economy". (UNCLASSIFIED)
6. From Staff Director, Committee on World Economic Practices, Business Advisory Council, Department of Commerce to DCI, 21 October 1958, expressing gratitude for the assistance of the Chief, Economic Research and his associates in the preparation of material on Soviet economic growth in graphic form for use at a recent meeting. (UNCLASSIFIED)
7. From Director, Hdqtrs., U.S. Army, Inter-American Geodetic Survey, Fort Clayton, Canal Zone to DCI, 28 October 1958, commenting on the usefulness of a geographic intelligence report, International Boundaries in Latin America in their daily dealings with boundary questions affecting planning, operations, and map production. (UNCLASSIFIED)

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8. From Director of Studies, Council on Foreign Relations, Inc., NYC, to DD/I, 2 October 1958, thanking the DD/I for arranging for an ORR employee to open the discussion on the Chinese economy at the first meeting of the Study Group on Communist China and U.S. Policy in Asia. He expressed gratitude for his valuable contribution to the work of the Study Group. (UNCLASSIFIED)
9. From the Operations Coordinating Board Assistant to the AD/RR, 11 December 1958, expressing appreciation for an intelligence briefing presented by an ORR employee to the OCB on Soviet Activities in the Antarctic. His presentation was praised for its organization and effectiveness. (SECRET)
10. From Director, Esso Export Corporation, NYC to DDCI, 7 November 1958, regarding the participation of an ORR employee as CIA representative in Paris to the COCOM review of the embargo list for petroleum products and equipment. He commented on the enthusiasm and able contribution this employee rendered in assisting their deliberations on the subject. (UNCLASSIFIED)
11. From Department of State, DRN/AFB transmitting letter of thanks from the Deputy Assistant Secretary for African Affairs to Chief, D/GG/RR, 28 February 1958, for a special study on Spanish Boundaries in Northwest Africa. He stated that this report was most helpful in the considerations of that mission on foreign policy problems in this area. (FOR OFFICIAL USE ONLY)
12. From Deputy Commandant, Industrial College of the Armed Forces to DD/I, 2 April 1958, conveying the gratitude of the College for the participation of ORR representatives as panelists for seminars entitled "Communist China's Industrial Economy", and "The Political and Economic Geography of Communist Asia". He commented on the effectiveness of each presentation and the contributions made to the school curriculum (and success of their mission). (UNCLASSIFIED)

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STATISTICAL SUMMARY OF ORR PRODUCTION
and
COORDINATED EIC REPORTS AND SURVEYS
1 January - 31 December 1958

<u>Table 1.</u>	<u>Reports Completed</u>		
	<u>Category</u>		<u>Total</u>
Economic Research Area	CIA/RR	44	47
	CIA/SC/RR	15	16
	IM	22	19
	RA	19	20
	MP	53	45
	SC/MP	4	0
	IP	30	28
	SC/IP	7	0
	CSM	87	62
	ERA Procedures (Internal ORR publications)	5	0
			<u>286</u>
Geographic Research Area	G	5	1
	MR	3	0
	GR	44	22
	G/E	11	14
	G/I	33	56
	GM	7	3
	G/S	18	47
NIS Sections			<u>121</u>
			<u>142</u>
	Economic Area	17	19
	Geographic Area	29	31
Contributions to NIS Annuals			<u>46</u>
			<u>50</u>
Coordinated EIC Reports and Surveys	Economic Area	2	4
	Geographic Area	7	12
			<u>9</u>
			<u>16</u>
			<u>36</u>
Economic Defense Projects 25X1B4d	EIC/WGR	26	0
	EIC-R	3	4
	EIS-S	6	13
	EIC-SC-WP	1	0
	EIC-ID	6	0
	(FM) RA	1	0
	MCB	48	46
	SC/RA	1	0
			<u>50</u>
1 F.I.I. monthly 2 Annuals.			<u>554</u>

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Table 2. Maps and Charts CompletedGeographic Area 1,299 ✓Table 3. Projects in Progress

	<u>Economic</u>	<u>Geographic</u>	<u>EIC</u>
In Reproduction	6	2	-
Editorial Review	8	2	-
In Preparation for Reproduction	5	5	-
In Division for Revision	1	3	-
Projects Scheduled:			
Research in Progress	300	52	11
Research Pending	<u>-</u>	<u>43</u>	<u>6</u>
TOTAL	320	107	17

Table 4. Maps and Charts in Progress

	<u>Geographic</u>
In Reproduction	51
In Proof	61
In Progress	<u>287</u>
TOTAL	399

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Attachment B

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ECONOMIC RESEARCH AREA

TABLE 1Distribution of Research by Geographic Area

<u>Area</u>	First Half Fiscal Year 1959			
	<u>Planned Distribution of MH's by Geographic Area</u>		<u>Actual MH's Expended by Geographic Area</u>	
	<u>Number</u>	<u>%</u>	<u>Number</u>	<u>%</u>
USSR	53,560	43	56,823.66	43.5
European Satellites	27,403	22	32,657.28	25.0
Sino-Soviet Bloc Activities in the Free World	7,473	6	10,580.96	8.1
Communist Far East	19,929	16	15,283.60	11.7
Sino-Soviet Bloc	<u>16,193</u>	<u>13</u>	<u>15,283.60</u>	<u>11.7</u>
TOTAL	<u>124,558</u>	<u>100</u>	<u>130,629.10</u>	<u>100.0</u>

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ECONOMIC RESEARCH AREATABLE 2Man-hours Applied to Project Research, Consultation, and
Support of Other CIA Components and to Other Agencies

Consumer	<u>First Half Fiscal Year 1958</u>		<u>First Half Fiscal Year 1959</u>	
	Man-hours	% of Total Research & Consultation	Man-hours	% of Total Research & Consultation
Office of:				
National Estimates	20,642	17.0	21,292.54	16.3
Current Intelligence	10,596	8.7	9,405.30	7.2
Scientific Intelligence	540	0.5	635.15	0.5
Deputy Director, Intelligence	2,156	1.8	2,612.58	2.0
Deputy Director, Plans	3,438	2.8	3,526.99	2.7
Basic Intelligence	16,083	13.3	16,981.78	13.0
Economic Defense Community	7,267	6.0	6,139.57	4.7
Economic Intelligence Committee	8,669	7.2	5,747.68	4.4
Other Agencies	<u>8,393</u>	<u>6.9</u>	<u>8,229.63</u>	<u>6.3</u>
Total Direct Support	77,784	64.2	74,589.22	57.1
Programmed Indirect Support	<u>43,384</u>	<u>35.8</u>	<u>56,039.88</u>	<u>42.9</u>
Grand Total	<u>121,168</u>	<u>100.0</u>	<u>130,629.10</u>	<u>100.0</u>

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